MAKE YOUR MARK. CREATE YOUR LEGACY.
AN INTRODUCTION TO PLANNED GIVING STRATEGIES
At the Michael C. Carlos Museum, world cultures are brought to life through exceptional works of art and rare artifacts. I invite you to become part of the story.

Founded in 1919, the Carlos Museum has long been dedicated to collecting, preserving, exhibiting, and interpreting art and artifacts from antiquity to the present. Philanthropy is the catalyst behind the museum's sustained growth, and planned gifts ensure that the Carlos Museum continues to tell the stories of civilization for many more generations.

I have made a bequest to support an endowed lecture in Asian art, and I encourage you to create your own legacy by making an estate gift to the Carlos Museum. Together we can secure the museum’s future, expand and preserve its world-class permanent collections, fund scholarly research for the public good, and strengthen innovative educational programs.

Sincerely,

BONNIE SPEED   |   DIRECTOR   |   MICHAEL C. CARLOS MUSEUM
The quality of a museum is determined by the quality of its permanent collections. Compelling works of art not only enhance the experience of visitors but also provide research opportunities for scholars. The Michael C. Carlos Museum is dedicated to adding important works of art to its collection—Egyptian, Nubian, and Near Eastern; Greek and Roman; the Americas; African; Asian; and works on paper—to offer a more complete picture of how diverse cultures have contributed to the unfolding of civilization.

The Carlos Museum relies primarily on gifts of art to build its collection, which are used for exhibitions as well as educational programs. When alumni and friends contribute works from their personal collections, whether naming the Carlos Museum in their wills or making an outright gift, their treasures will be preserved and shared with future generations.

The Carlos Museum and the Office of Gift Planning will help you determine the giving strategy to fit your lifestyle and enhance your financial security.

“Art often illuminates the human condition, and works on paper afford a certain intimacy for us to see with new eyes. It is a privilege to know that my collection will be used for teaching and learning purposes at the Carlos Museum, providing insights into what it means to be human.”

ELAINE LEVIN, a member of the Carlos Museum Board of Directors and 1836 Society, has named the museum as a beneficiary in her will to receive part of her extensive collection of works on paper.
The Michael C. Carlos Museum depends upon the goodwill of Emory alumni and friends who share the vision for preserving and sharing priceless treasures that map an extraordinary breadth of ancient cultures, customs, and legacies. There are many ways to support Emory’s mission to “create, preserve, and share knowledge in the service of humanity”—from making a bequest of art to naming the Carlos Museum as a beneficiary of a qualified retirement plan.

We understand that the process of planning your estate can seem overwhelming, but it needn’t be difficult. The dedicated professionals in Emory’s Office of Gift Planning have the experience to work with you and your advisers to create a plan that meets your financial and philanthropic goals. Gift planning can provide an opportunity to stretch beyond what you think is possible.

Whatever the size of your estate, it is important to have a plan.
ACQUISITION

Some 20,000 artifacts from antiquity, as well as works on paper from the Renaissance to the present day, allow visitors to experience the art and history of world cultures. Building **permanent collections** is a top priority for the Carlos Museum. Estate gifts, from works of art to funds earmarked for acquisitions, can help the museum add treasures left by history’s artists, scribes, and storytellers.

CONSERVATION

The Carlos Museum’s **conservation program** is unique in the Southeast. The region’s only university conservation laboratory is a center for interdisciplinary inquiry. Highly trained conservators, scientists, scholars, and students work together to ensure valuable historical works of art are preserved. Your investment can provide state-of-the-art equipment, attract and retain qualified staff, and fund faculty and student research.

EDUCATION

The Carlos Museum is a place for dynamic intellectual and artistic engagement for Emory faculty and students; young children participating in the **Artful Stories** program; more than 18,000 K-12 students touring the museum each year; thousands of people of all ages engaging in art-making workshops; renowned scholars, writers, and artists sharing their knowledge through lectures and gallery talks; and many other activities for children and adults. Your investment in the Carlos Museum’s **education initiatives** will provide meaningful experiences for learners of every age in the Atlanta region and beyond.

UNRESTRICTED

It is difficult to predict the needs of the Carlos Museum in the years ahead. By making an **unrestricted estate gift**, you provide funding that allows the museum to address the greatest priorities at the time your legacy gift is received.
Partner with the Carlos Museum today to learn how you can help preserve and share the stories of civilization through art.

Gail Habif
Senior Director of Development
Michael C. Carlos Museum
404.727.2251
ghabif@emory.edu
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“\nThe Carlos Museum has inspired so many students for so many years, and it is exciting to be a part of its future. I gave my first donation to the museum in the 1970s and have continued to give ever since. I want to support the museum in perpetuity, and my planned gift of antiquities, classical photographs, and part of my residual estate helps me do that.”

WILLIAM ZEWADSKI, an alumnus of Emory College of Arts and Sciences, past Carlos Museum board member, avid collector, and 1836 Society member, has made a bequest of Greek and Roman antiquities as well as photographs from the 19th century.
Interesting facts from the collections

OLDEST OBJECT
Clay sculpture  |  9,000 years

HEAVIEST OBJECT
Garland sarcophagus  |  2 tons

OLDEST MUMMY IN NORTH AMERICA
Emory Old Kingdom Mummy  |  4,000 years

ARTIFACT SENT ON SPACE MISSION
Near Eastern clay tablet  |  2112–2004 B.C.  |  Discovery 1989
Sonny Carter 69C 73M, astronaut

“\nI am a great fan of the Carlos Museum’s education department. Through its creative programming, we gain a broader grasp and deeper understanding of the art we so value in the Carlos. Lectures, tours, workshops, book clubs—all expand our sense of the object and its culture, of skill and sensibility.”

MARGUERITE INGRAM, a docent at the Carlos Museum for 23 years and 1836 Society member, has named the museum as a beneficiary of her IRA to endow the director of education position.
BEQUESTS: GIFTS IN YOUR WILL
One of the simplest and most popular ways to make a gift, a charitable bequest allows you to name the Carlos Museum as a beneficiary of your estate and invest in its future success. When you make a bequest—whether works of art or another type of gift—to the Carlos Museum, you continue to control your assets during your lifetime so your current needs are met. A well-designed bequest can result in lower estate taxes, allowing you to leave more for loved ones.

RETIREMENT PLANS
Naming the Carlos Museum as a beneficiary of your IRA or other qualified retirement plan is a simple and tax-effective gift. The assets held in your retirement plan may be subject to both estate and income taxes, reducing the value received by your heirs. Because of Emory’s tax-exempt status, these gifts avoid both potential taxes.

CHARITABLE REMAINDER TRUSTS
With a charitable remainder trust, you or other named individuals can receive annual income from assets you place in the trust you create. Payments can be variable or a fixed amount. After the life of the named individuals or a set period of years, the balance in the trust goes to the Carlos Museum.

CHARITABLE GIFT ANNUITIES
Charitable gift annuities are simple contracts between you and the Carlos Museum that provide you and a second individual, if you choose, income for the rest of your life and direct future support to the museum. A gift annuity can be established with a minimum of $10,000 and funded with cash or appreciated securities. Your initial gift is partially tax deductible.

OUTRIGHT GIFT OF APPRECIATED PROPERTY
Assets with appreciated value that have been held for more than a year, such as stocks, real estate, business interests, or works of art, are excellent sources of outright giving. You can deduct the fair market value of the donated asset and pay no capital gains tax on the increased value.
### Gift Plans at a Glance

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**What to Give**
- Works of art
- Cash
- Stocks, bonds, and mutual funds
- Retirement plan assets
- Real estate
- Closely held stock
- Business interests
- Life insurance
- Tangible personal property

**Planning Has Its Benefits.**

- Reduce income tax
- Reduce estate tax
- Reduce capital gains tax
- Current income
- Fund with cash
- Fund with appreciated securities
- Fund with real estate
- Fund with personal property

**Fund with cash**

- Reduce tax.
- Current income.

**Fund with appreciated securities**

- Reduce tax.
- Fund with cash.

**Fund with real estate**

- Reduce tax.
- Fund with cash.

**Fund with personal property**

- Reduce tax.
- Fund with cash.
“We’ve always collected with a view to leaving our collections to an institution like the Carlos. We wanted to give to a university museum since this is the context in which works of art are most likely to be used for research and teaching. In fact, it’s not easy to find repositories as fine as the Carlos. We’re grateful to the museum’s director and curatorial staff for giving our old master prints and Native American pottery a future home.”

WALTER MELION, Asa Griggs Candler Professor of Art History and chair of the Art History Department, and his husband, JOHN MACKENZIE CLUM, have made bequests of their Native American ceramics collection and about 100 works on paper.
In 1836, a college was founded that one day would become one of the nation’s premier institutions of higher learning, research, and health care. Today the 1836 Society honors the legacy of Emory’s founders by recognizing individuals whose dedication and wise planning will strengthen Emory for generations to come.

We invite you to become a member of the 1836 Society by creating your legacy at the Carlos Museum through a gift from your estate. The generosity of 1836 Society members is evident throughout Emory—it has erected buildings, endowed professorships and scholarships, funded research, and expanded excellence in health care.

“I love the collections and the variety of the objects, but what is most incredible is the way the Carlos applies these collections in the best educational programs. The museum brings to life why these objects are important, what they tell us about who we are, and what lessons we can learn from them.”

DIRK BROWN, an alumnus of Emory’s Goizueta Business School, Carlos Museum board member, and 1836 Society member, has made an estate gift to provide unrestricted funding that will support the greatest priorities in the future.
“Communication with people of other cultures will bring more peace to the world than any military intervention. It is part of the museum’s role to bring that understanding to people.”

CHARLES ACKERMAN, an Emory School of Law alumnus, Carlos Museum trustee, and 1836 Society member, has included the Carlos in his will so the museum can continue to share the history and cultures of the world with others.